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(54) Title: SYSTEM AND METHOD FOR PROVIDING INFORMATION TECHNOLOGY IT EXPERT REFERRAL OVER A NETWORK

(57) Abstract: A system and method for assigning an IT expert to a request for assistance. The invention allows users to request assistance over the Internet to an IT expert server having a file of qualified IT experts. The trouble "ticker" is assigned and alias and is sent out to a number of IT experts having the correct qualifications who then have an opportunity to respond. The first to respond is assigned an alias and communicates with the requester via the IT expert server. Upon completion of the ticket, the IT expert so designates and the requester is asked to fill out a survey noting the satisfaction with the service provided. IT experts are assigned rankings and are paid and solicited for further work based upon the ranking.

**Title of Invention:** System and Method for Providing Information Technology IT  
Expert Referral Over a Network

**Relationship to Other Applications:**

This application is a utility application which claims the benefit and priority of  
Provisional Application No. 60/167,065 entitled "System and Method for Providing Expert  
Help Over a Network" filed 11/23/99.

**Field of the Invention:**

This invention relates generally to network access to for IT expert referral. More  
particularly the present invention provides a system and method for obtaining assistance via  
network notification to information technology (IT) experts and subsequent IT expert-to-  
customer contact.

**Background of the Invention:**

As computers and software proliferate, the need for help desk assistance becomes  
more and more critical especially to those customers who are not technically sophisticated.  
The difficulty is that individual customers become frustrated when they must sit on a help  
line for many hours before they get human assistance or, equally frustrating, are shunted to a  
frequently asked question screen, which has the answers to many questions that are not  
helpful for the particular problem that the individual customer is experiencing.

The present invention seeks to solve these problems by qualifying and establishing a  
large number of IT experts in various hardware and software fields. For example, the present  
invention will solicit and store qualifications for IT experts in Microsoft Windows, Sun  
products, Apple products, and indeed, many other hardware and software products. These IT  
expert, most of whom will be independent contractors (although not necessarily so), will be  
directly accessible via the database of the present invention.

1           After registration with the system of the present invention and providing customer  
2   contact information such as telephone number and email, when a customer needs particular  
3   assistance with a particular product, the customer will access the website of the present  
4   invention and state the problem being experienced. Once a query for help is made, the  
5   system of the present invention sends a pager or other notification signal to an appropriate IT  
6   expert who can handle the problem being experienced by the customer. Indeed, a call may  
7   go out to multiple IT experts all of whom have the option to respond to the particular request.  
8   Contact information is also presented to the IT experts in this first communication.

9           Whichever IT expert responds first to the request, that IT expert will have the contact  
10   information to immediately contact the customer experiencing the problem. In this fashion,  
11   one of the key problem areas, that is time of responding to a problem, is minimized.

12          The customer can then respond either via email through the server of the present  
13   invention to the customer or via Internet telephone through the server of the present invention  
14   to the customer. In either case response goes through the server of the present invention in  
15   order to be able to track such statistics as response time, and whether the customer was  
16   satisfied or dissatisfied with the response of the particular IT expert.

17          Once the problem is solved, the customer who experienced the problem is given the  
18   option of responding to a questionnaire simply asking if the problem was solved, if the IT  
19   expert was responsive to the question, and several other key questions that will assist the  
20   system of the present invention in evaluating the performance of the IT expert.

21          Statistics will be kept on the performance of IT experts involved in the system. For  
22   those IT experts who continually rank highly, calls for assistance will continue to go to those  
23   IT experts on a priority basis. For those IT experts who are not as successful, they will fall  
24   lower in the priority list and will not receive as many calls for assistance from the system.

1 A key aspect of the present invention is that the system is adaptive. If an Expert who  
2 is lower on the priority list continues to get high grades from customers for accomplishing  
3 tasks, that Expert can climb in the rankings and achieve a priority ranking thereby receiving  
4 more request for assistance and hence, more revenue from responding to customers needs.  
5 Conversely, those IT experts who do not receive favorable rankings from customers will fall  
6 in the overall rankings of IT experts and will not receive as many phone calls for assistance  
7 an hence, will not receive as much revenue from the present invention.

8 All transactions, in the preferred embodiment occur via the Internet, although this not  
9 meant as a limitation, whether they be by email, or Internet telephone. It will be apparent to  
10 those skilled in the art that communication between customer and Expert can also occur via  
11 telephone as well. And all transactions will proceed through the server of the present  
12 invention so that activities of IT experts and statistics on types and frequencies of certain  
13 troubled calls can be monitored.

14 In summary what is created is a virtual help desk, having IT experts in many different  
15 areas of IT expertise immediately and competently responding to the queries for help from  
16 customers who are in need.

#### 18 **Brief Description of the Figures:**

19 Figure 1 illustrates the architecture of the present invention.

20 Figure 2 illustrates the overall assign up, assignment, and Expert response flow of the  
21 present invention.

22 Figure 3 illustrates the Expert enrollment and interaction with the system of the  
23 present invention.

24 Figure 4 illustrates login screen for the Expert Help Network.

1           Figure 5 illustrates a screen in which the customer selects whether he needs help or is  
2   an IT expert.

3           Figure 6 illustrates a screen consisting of a data entry sheet requesting a plurality of  
4   answers pertaining to customer identification.

5           Figure 7 illustrates the customer's customer ID and password for entering the Expert  
6   Help Network.

7           Figure 8 illustrates a screen which confirms the customer's Name, city, and email  
8   address that is currently valid in the system.

9           Figure 9 illustrates a plurality of questions pertaining to the customer's problem.

10          Figure 10 illustrates a plurality of items of information regarding the customer's  
11   ticket.

12          Figure 11 illustrates a plurality of statuses regarding the customer's ticket(s).

13          Figure 12 illustrates a plurality of criteria for IT experts to join the Expert Help  
14   Network.

15          Figure 13 illustrates a plurality of questions and answers pertaining to IT experts.

16          Figure 14 illustrates a synopsis of how the network functions and the role of IT  
17   experts.

18          Figure 15 illustrates a plurality of requests for items of information regarding contact  
19   information for the IT expert(s).

20          Figure 16 illustrates a plurality of pull down menus regarding the IT expert's skills.

21          Figure 17 illustrates a request for a plurality of items of information regarding  
22   experience as an IT expert.

23          Figure 18 illustrates a plurality of items of information regarding references for IT  
24   experts.

Figure 19 illustrates the conceptual flow for assigning an alias to customer problems and IT expert's assignments.

### Detailed Description of the Invention

Referring to Figure 1, the overall architecture of the present invention is illustrated. A plurality of customers, indeed anyone connected to the internet 9 or a network contemplated as one to be used with the present invention, her illustrated simply as two customers, customers 10 and 12, who are connected to the internet, may experience some form of computer-related or other type of problem. Customers 10, 12 contact the Expert Reference Server (ER Server) 16 via a network, preferably the Internet 14 although this is not meant as a limitation. For example other networks in addition to the Internet can also be used. Customers 10, 12 pose the particular question or problem being encountered with their system to the ER Server 16 over the network 14.

Depending upon the type of problem cited, ER Server 16 reviews its database of IT experts 20 for the individual or individuals who are capable of responding to the questions from customers 10, 12. This database of IT experts not only has qualifications of the IT experts but also maintains a database of their availability if, for example, an Expert is on vacation for a period of time or is unavailable during a period of the day. Upon determining the appropriate individual(s) who can respond to the problem, ER Server 16 sends a message via any means known in the art such as wired or wireless as in the case of beepers and cell phones, in this case illustrated as over the public switch telephone network (PSTN) 18 to the beepers of IT experts 22, 24, 26 with a general reference to the type of problem being encountered. This notification via PSTN is for illustrative purposes only. It is anticipated that the IT experts can also be notified via the Internet and the various means, such as Internet paging and telephone for example, available via the Internet.

1 IT experts **22, 24, 26** are beeped and, preferably an alphanumeric display noting the  
2 problem being posed by customers **10, 12** is displayed. At that point any one of the IT  
3 experts **22, 24, 26** can respond to ER Server **16** that he will handle the problem being posed.

4 Contact from IT experts **22, 24, and 26** can occur via the public switch telephone  
5 network **18** or via the network **14** to the ER Server **16**.

6 Thereafter, and assuming, for example expert **22** responded **first** to the query, ER  
7 Server **16** allows contact between expert **22** and, for example customer **12** in the following  
8 fashion:

9 Internet telephone service can be used whereby expert **22** is connected to customer **12**  
10 through server **16**. In this fashion, ER Server **16** can monitor the length of the call and broker  
11 the connection between expert **22** and customer **12**. Alternatively, the telephone number of  
12 customer **12** can be provided to expert **22**. Thereafter, expert **22** can contact customer **12** to  
13 solve the problem by voice communication. Finally, ER Server **16** can provide the email  
14 address of customer **12** to expert **22** thereby allowing email response to the problem being  
15 posed and also allowing back and forth communication over network **14**.

16 After the completion of the service call, expert **22** provides notification to ER Server  
17 **16** that the call has been successfully completed. Expert Server **16** logs the completion time  
18 and date of the trouble call that was requested by the customer. In this way, statistics on the  
19 general length of time to respond to and solve customer problems can be logged. Further,  
20 information on the individual expert can also be kept in the following fashion:

21 ER Server **16** not only brokers a trouble call between customers **10, 12** and IT experts  
22 **22, 24, and 26**, but also keeps track of how well the individual IT experts perform in their  
23 assigned tasks. For example, at the completion of each trouble call, and after the expert has  
24 provided notification to the ER Server that the call has been completed, the ER Server  
25 provides a questionnaire to the customers **10, 12** seeking input on customer satisfaction with

1 the service being offered. At that point, customers 10, 12 have the opportunity to respond to  
2 ER Server 16 regarding whether the IT experts 22, 24, or 26 solved the problem successfully  
3 and in a timely fashion.

4 ER Server 16 collects statistics on the performance of IT experts 22, 24, and 26,  
5 thereby monitoring the performance of these IT experts. If any of the IT experts continually  
6 score poorly in the estimation of customers 10, 12, the ranking of that particular expert will  
7 be established as lower than that of the IT experts who perform successfully on various  
8 assigned tasks. This has several ramifications. If a particular expert does not perform well,  
9 that expert is put low on the priority list for being contacted by ER Server 16. If the expert  
10 continues to perform poorly on the tasks that are assigned, eventually the expert will be  
11 eliminated from the roll of IT experts who can respond to service calls. Conversely, if an  
12 individual expert who initially performed poorly begins to perform better on service calls  
13 assigned to that IT expert, ER Server 16 will keep track of that improvement thereby raising  
14 the priority of that expert and list of IT experts who will be called to respond to service calls.  
15 In this fashion, expert database 20 is continually updated and quality control on the IT  
16 experts who are contacted and assigned customer tasks can therefore be maintained.

17 In this fashion, a series of problems are solved by the system and method of the  
18 present invention. First, individual customers 10, 12 no longer have to wait inordinate  
19 amounts of time for response to trouble calls on their computer systems.

20 Server 16 establishes the mutual arrangement between customers 10 and 12 before  
21 any service call is made to IT experts 22, 24, and 26. In this fashion, IT experts 22, 24, and  
22 26 do not have to be concerned about how to invoice and collect fees from customers 10, 12.

23 Customers 10, 12 benefit from having the best IT experts who can solve technical  
24 problems since the ER Server 16 continually updates and establishes quality control via its



expert database **20** over the IT experts who are called to respond to trouble calls in the first place.

On a periodic basis, ER Server **16** and the business entity that surrounds that server, remits to IT experts **22, 24, and 26** their fees for the service calls responded to on a monthly or quarterly basis as desired.

Referring now to **Figure 2** the overall assign up, assignment, and expert response flow of the present invention is illustrated. A customer accesses the system of the present invention **100** preferably over the Internet although this is not meant as a limitation. For example, a customer may also provide information via a telephone or other means of communication.

Confirmation of the sign-up is then sent to the member via electronic mail **102** providing a log in ID and password. Thereafter, either immediately upon receipt of the e-mail or on a subsequent occasion when services are needed the member logs into the system **104**. At this point the member has a number of options.

If the member is signing on initially the member can create or change the membership profile **148**. This profile provides information on the member's organization, the type of equipment, and any other information relating to software and operating systems being run on the equipment and the network as appropriate.

The member also has the option of changing the member's password **150**. If the member has already provided a request for assistance referred to as a "ticket" a member can view the ticket history **152**. If the ticket relates to a particular problem that the member has asked to be solved, the member can view the specific ticket **154** to insure that the problem has been stated appropriately. Additionally the member is asked to fill out a survey **156** that relates to how well the problem was solved, was the problem solved in a timely way, was the interaction with the Expert satisfactory and other factors that would give rise to quality

1 assurance with respect to managing the IT experts who are affiliated with the system of the  
2 present invention. After the survey is completed it is submitted by the member **158** and the  
3 ticket is closed by the system. Thereafter billing for the services is accomplished **159**.

4         Once the member has an account number and a password, the member can call in at  
5 any time whenever there is a problem requiring a consultant. In this instance, a member logs  
6 onto the system **104** and creates a ticket **106** which describes the difficulty being encountered  
7 in as much detail as possible. Once the screen detailing the problem has been completed the  
8 ticket is submitted **108** by the member. Confirmation email is sent to the member. The  
9 server of the present invention then takes the ticket that is submitted and e-mails it **110** to the  
10 appropriate IT expert group for response. In this instance the group may be a group of  
11 network IT experts, a group of IT experts in a particular software application, and the like. It  
12 should also be noted that communication with the IT expert groups is made by regular e-mail  
13 and wireless devices to the extent that the database has the appropriate communication  
14 information. This system then continually inquires to determine if any IT expert has  
15 responded to the ticket and indicated that he or she would respond. This is referred to as  
16 "booking" the ticket **112**. If after a definable number of minutes the ticket is still not booked  
17 **114** the system sends e-mails to another group of IT experts who can appropriately respond  
18 to the question being posed.

19         If the ticket has been booked by an IT expert **112** the system determines how the  
20 ticket was booked **116**. If the IT expert responded over the Internet the Internet procedures  
21 invoked **117** as will be more fully explained below.

22         If the IT expert responded via e-mail the IT experts e-mail response is received by the  
23 system **118** and the system assigns the ticket to the IT expert who responded **120**.

24         Upon assigning the ticket to the IT expert **120** an e-mail or other notification is sent to  
25 the IT expert requesting that he initiate customer contact. In addition, e-mail is sent to other

1 IT experts in the group of IT experts to whom e-mail was sent informing them that the ticket  
2 was booked to another IT expert **124** although the identify of the IT expert to whom the ticket  
3 was booked is not necessarily disclosed.

4 As further noted below, communication and record keeping of the system involves  
5 assigning alias numbers to both the request for assistance and for the response by the IT  
6 expert in order to ensure that communication flows through the server of the present  
7 invention.

8 The IT expert then communicates with the member **128** and the member interacts with the IT  
9 expert **126** to solve the problem disclosed in the ticket.

10 When the ticket has been closed, that is, the problem has been solved by the IT  
11 expert, the IT expert so notifies the server of the present invention to close the ticket and  
12 enters information that describes how the problem was resolved **130**. The server then sends  
13 an e-mail message to the member **132** noting that the IT expert has closed the ticket and has  
14 solved the problem. The e-mail also requests that the member fill out a survey to note the  
15 members satisfaction with the problem solution, the IT experts performance, and any other  
16 factor that affects the resolution of the ticket originally submitted by the member.

17 The survey is a critical aspect of the present invention and is done in an automated  
18 fashion to minimize the labor associated with the member's participation in the survey.  
19 Further, the survey serves as a basis for paying IT experts for work accomplished or not  
20 paying IT experts when the result has been unsatisfactory to the member.

21 After submission of the survey to the member, the system continually inquiries in its  
22 own records to determine if the survey report has been filled out **134**. If the survey has not  
23 been filled out after two days, a second e-mail request for the completion of the survey is sent  
24 to the customer **136**. The system then again keeps track internally to determine if the survey  
25 has been filled out **138**. If the survey has not been filled out after, for example two days, a

1 final e-mail request is sent to the member **140** to fill the survey out. The system then again  
2 internally monitors whether the survey has been completed **142**. If the survey has not been  
3 completed the survey is automatically filled in with certain default values and the ticket  
4 status is changed to a "closed" status **144**. Thereafter billing of the member ensues **145**.

5 When the member is in the process of completing the survey the member logs in **146**  
6 and views the ticket history **152**.

7 The member can then complete the survey as noted earlier **156** and submit that survey  
8 to the system **158**. Thereafter billing ensues.

9 Referring now to **Figure 3** the IT expert enrollment and interaction with the system is  
10 illustrated. An IT expert initially logs onto the system of the present invention and signs up  
11 to become an IT expert **160** who can be called upon to satisfy various tickets. The system of  
12 the present invention then sends an e-mail to the IT expert **162** confirming his registration  
13 and informing him of the pending assessment of the IT expert qualifications, and that this  
14 will take place BEFORE the IT expert is assigned any tickets by the system. In this way the  
15 entity managing the server of the present invention ascertains the IT expert's qualifications  
16 and areas of IT expertise. If the IT expert is not qualified in any of the areas in which the  
17 system responds to members an e-mail is sent to the IT experts so notifying the IT expert. If  
18 the IT expert has the requisite qualifications a confirmation e-mail is sent to the IT expert **168**  
19 and the IT expert is then logged onto the system. The IT expert is assigned a password and  
20 customer identification number for which the IT expert can then log in **170**.

21 At any point the IT expert can change or alter the IT expert's profile **172** thereby  
22 allowing the IT expert to more particularly respond to and be provided with information on  
23 tickets.

1           When the IT expert logs in **170** the IT expert can check in and out of the system **174**  
2   and change the IT expert's availability **176** so that the system knows when the IT expert will  
3   be available to receive requests for ticket response.

4           The IT expert can also note the IT experts own tickets **178** that have been responded  
5   to, assigned and are in progress. The IT expert can click on any ticket that is noted and view  
6   a specific ticket **180** and determine if the ticket has been closed **182**. If the ticket is not  
7   closed, it continues to be listed on those open tickets assigned to the IT expert **178**. If the  
8   ticket is closed as far as the IT expert is concerned, the IT expert assigns a "close pending" to  
9   the ticket as noted earlier in Figure 2 **130**.

10          Once the IT expert logs in **170** the IT expert can also go to a file of unassigned tickets  
11   **184** and view any specific one ticket **186** and determine if the IT expert can respond to the  
12   ticket. If the IT expert can respond the IT expert will book the ticket as noted earlier in  
13   Figure 2 **120**.

14          Upon entering the website, **Fig. 4**, the customer is presented with a login screen  
15   which asks also whether the customer is an IT expert or needs help **200**. If the customer is not  
16   a member of the service, he is presented with a screen, **Fig 5**, in which he must select  
17   whether he needs help or he is an IT expert **202**.

18          If the customer selects the "I need help" option **202**, the customer is presented with a  
19   screen, **Fig. 6**, which consists of a data entry sheet requesting a plurality of answers  
20   pertaining to customer identification **204**. Upon completion of the data entry sheet, **Fig. 6**,  
21   the customer is presented with a screen, **Fig. 7**, which furnishes the customer with his  
22   customer ID and password **206**.

23          In the Customer Home screen **Fig. 8**, which confirms the customer's Name, City, and  
24   email address **208** that is currently valid in the system. Upon selecting "View/Create Ticket"  
25   the customer is presented with a screen, **Fig. 9**, which asks whether this is a new ticket **210**

1 and under what category this ticket is to be considered **212**. Examples of categories are MS  
2 Exchange, Windows NT, etc. Additionally, the customer is furnished with a text box in  
3 which he enters a description of his current problem **214**. The customer is also presented  
4 with a button which allow him to enter the ticket **216**.

5 Once the ticket is entered, the customer is presented with a screen, **Fig. 10**, which  
6 furnishes a plurality of items of information regarding the customer's ticket **218**. The  
7 customer is notified by the IT expert via email (although this is not meant as a limitation)  
8 when he has been assigned to the trouble call **220** by the server.

9 If the customer selects "Ticket History," **222** he is presented with a screen, **Fig. 11**,  
10 which furnishes a plurality of statuses regarding his ticket(s) **224**.

11 If the customer selects the "I am an IT expert" option **200**, the customer is presented  
12 with a screen, **Fig. 12**, which gives some of the criteria for IT experts to join the IT expert  
13 Help Network **226**. If the customer selects the "FAQ" (frequently asked questions) button  
14 **228**, he is presented with a screen, **Fig. 13**, which answers a number of question pertaining to  
15 IT experts and the IT expert Help Network.

16 If the customer selects the "How it works" button **230**, he is presented with a screen,  
17 **Fig. 14**, which gives a synopsis of how the IT expert Help Network functions and the  
18 function of IT experts in the network.

19 If the customer selects the "Sign up" button **232**, he is presented with a screen, **Fig.**  
20 **15**, which furnishes a plurality of requests for items of information regarding contact  
21 information for the IT expert **234**. Upon selecting the "Next" button **236**, the customer is  
22 presented with a screen, **Fig. 16**, with a plurality of pull down menus regarding his skills **238**.

23 If the customer selects the "Next" button **236**, he is presented with a screen, **Fig. 17**,  
24 which requests a plurality of items of information regarding his experience as an IT expert  
25 **240**. If the customer selects the "Next" button **236**, he is presented with a screen, **Fig. 18**,

1 which requests a plurality of items of information regarding references as well as a text box  
2 for entering data pertinent to the reference **242**.

3 Referring to **Figure 19**, the present invention performs an "aliasing" function  
4 to both ensure that communication between the ultimate client and the IT expert occurs  
5 through the server of the present invention.

6 When a ticket is open **250**, the server creates an alias **252** for the ticket that is open.  
7 This alias is assigned to not only the ticket, but is associated with the person or entity that is  
8 having the particular problem. In this fashion, the server can always determine who the point  
9 of contact is at the customer entity for billing and survey purposes.

10 The ticket number with the associated alias is then made available to IT experts to  
11 respond to. When an IT expert accepts the particular troubled ticket **254**, the IT expert is  
12 assigned an alias **256** which is associated with the ticket alias created **252**. This IT expert  
13 alias **256** varies from ticket to ticket so that a particular IT expert who accepts five different  
14 tickets may in fact have five different aliases associated with the different tickets. All  
15 communication with respect to the problem occurs via the server which then associates the  
16 various ticket and IT expert aliases and ensures that communication reaches the ultimate  
17 customer from the IT expert.

18 When the ticket is closed **258**, the various aliases are cleared **260** and these aliases are  
19 subsequently made available for further tickets and aliases. Thus, the unique alias for the  
20 ticket and for the IT expert accepting the ticket occur only so long as the ticket is opened.  
21 Once the ticket is closed, the alias identifiers are made available again for re-use.

22 It will therefore be apparent to those skilled in the art that other variations of the  
23 present invention in contacting IT experts via wired and wireless networks and in contacting  
24 customers by the IT experts using both wired and wireless means can be achieved without  
25 departing from the scope of the invention as disclosed.

I claim:

1. A system for obtaining IT expert referral comprising:
  - A server further comprising a file of IT experts having qualifications;
  - A network connected to the server for allowing access to the file of IT experts;
  - At least one user computer connected to the network for submitting a request for assistance ticket from a user and for accessing the file of IT experts in the server;
  - The server further comprising assignment instructions for assigning the request for assistance ticket to at least one IT expert for response and for receiving a response from the at least one IT expert to the assignment; and
  - The server further comprising communication instructions for facilitating the communication between the IT expert and the user regarding the request for assistance ticket.
2. The system for obtaining IT expert referral of claim 1 wherein the server further comprises instructions for registering and qualifying IT experts to be resident on the file of IT experts.
3. The system for obtaining IT expert referral of claim 2 wherein the assignment instructions further comprise contact information for contacting a the plurality of IT experts based upon IT expert qualifications.
4. The system for obtaining IT expert referral of claim 1 wherein the server further comprises instructions for sending a satisfaction questionnaire to the user upon completion of the request for assistance ticket by the IT expert to whom the request for assistance ticket was assigned.
5. The system for obtaining IT expert referral of claim 4 wherein the server further comprises instructions for creating a quality ranking for the IT expert to whom the request for assistance ticket was assigned.



- 1       6.     The system for obtaining IT expert referral of claim 5 wherein the server further  
2             comprises instructions for paying to IT expert based upon the quality ranking  
3             from the user.
- 4       7.     The system for obtaining IT expert referral of claim 5 wherein the server further  
5             comprises instructions for rank ordering IT experts based upon quality ranking  
6             and assigning subsequent requests for assistance based upon quality rankings.
- 7       8.     The system for obtaining IT expert referral of claim 1 wherein the server further  
8             comprises instructions for assigning an alias to the request for assistance from a  
9             user and for assigning an alias to the IT expert who responds to the request for  
10            assistance.
- 11      9.     The system for obtaining IT expert referral of claim 8 wherein communication  
12            between the IT expert and the user occurs through the server and wherein the  
13            server comprises a file of assigned aliases for routing messages between the expert  
14            assigned to the request for assistance the user making the request for assistance.
- 15      10.    The system for obtaining IT expert referral of claim 2 wherein the instructions for  
16            registering and qualifying IT experts further comprises recording the availability  
17            of IT experts to respond to requests for assistance and the areas of IT expertise of  
18            the IT expert.
- 19      11.    The system for obtaining IT expert referral of claim 1 wherein the server further  
20            comprises instructions for allowing a user to view the a status of tickets for the  
21            user.
- 22
- 23      12.    A method for IT expert referral comprising:  
24            a user requesting assistance over a first network

1 a server receiving the request for assistance and creating a ticket associated with  
2 the request  
3 the server communicating the ticket to a plurality of qualified IT experts over a  
4 second network;  
5 at least on IT expert responding to the ticket  
6 the server facilitating communication between the IT expert and the user to solve  
7 the ticket.

8 13. The method for IT expert referral of claim 12 wherein the plurality of IT experts  
9 is created by registering IT experts and verifying their qualifications before  
10 communicating the ticket to any one IT expert.

11 14. The method for IT expert referral according to claim 12 wherein the first network  
12 is the Internet and the second network is the Internet.

13 15. The method for IT expert referral according to claim 12 wherein the first network  
14 is the Internet and the second network is a PSTN.

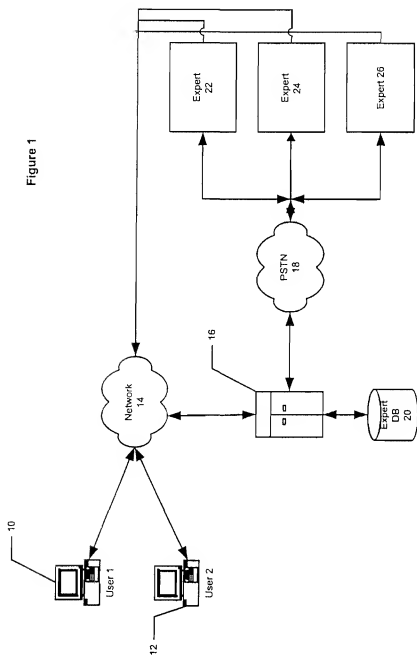
15 16. The method for IT expert referral according to claim 12 wherein the first network  
16 is the Internet and the second network is a wireless network.

17 17. The method for IT expert referral according to claim 12 wherein the facilitating of  
18 communication comprises the server assigning an alias to the user and an alias to  
19 the IT expert; and passing communication between the IT expert and the user  
20 through the server by associating the user alias and the IT expert alias.

21 18. The method for IT expert referral according to claim 12 further comprising the IT  
22 expert closing the ticket with the server upon completion of the ticket by the IT  
23 expert and the server submitting a satisfaction survey to the user upon the  
24 completion of the ticket by the IT expert.

25 19. The method for IT expert referral according to claim 18 further comprising paying

- 1                   the IT experts based upon the satisfaction survey.
- 2       20.    The method for IT expert referral according to claim 18 further comprising
- 3                   creating a ranking of the IT expert based upon the satisfaction survey.
- 4       21.    The method for IT expert referral according to claim 20 further comprising
- 5                   assigning subsequent tickets to the IT expert based upon the IT expert ranking.
- 6       22.    The method for IT expert referral according to claim 17 further comprising the
- 7                   server clearing the aliases upon completion of the ticket.
- 8





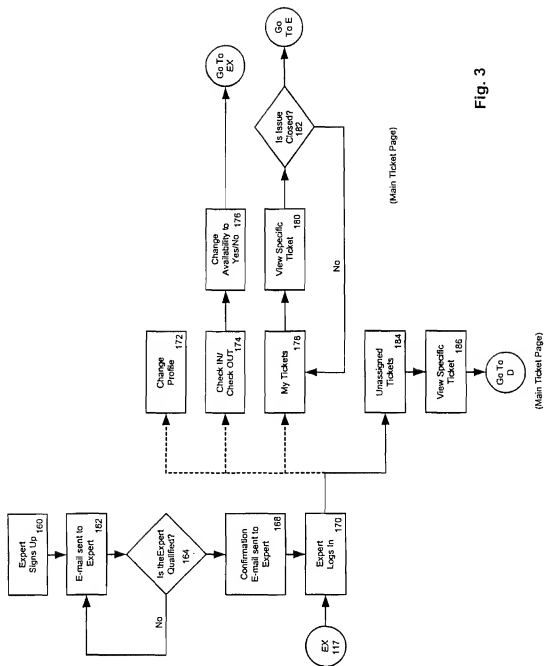


Fig. 3

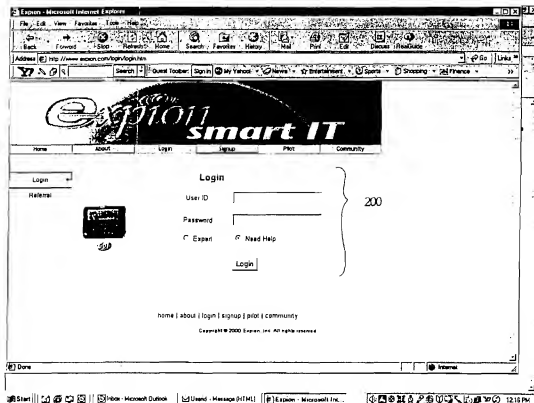


FIGURE 4

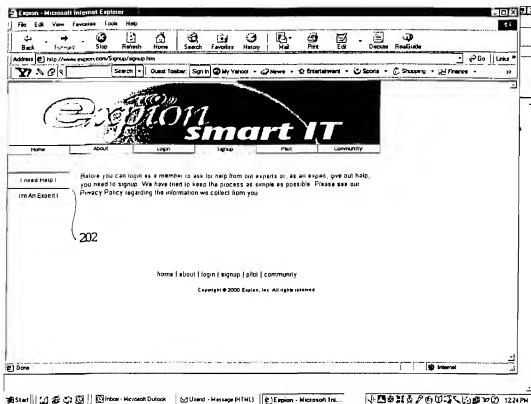


FIGURE 5



E-Helper.com - Microsoft Internet Explorer

File Edit View Favorites Tools Help

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Address http://192.168.0.1/signup/member/member\_signup.htm Go Links

# Expion smart IT

Home About Login Signup Free Trial Community

I Need Help!

Who Can Join?

FAQ

How It Works

Sign up

NOTE: An asterisk (\*) indicates a required field.

First name John

Last name Smith

Password

Confirm Password

Company

Email jsmith@aol.com

Address1 123 Main ST

Address2

City AnyTown

State AnyCity

ZIP 12131

Country USA

How Did You Hear About Us

I heard an article

Submit Info Clear Form

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FIGURE 6



FIGURE 7

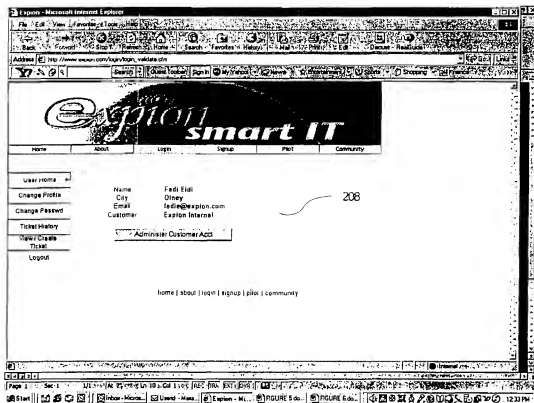


FIGURE 8

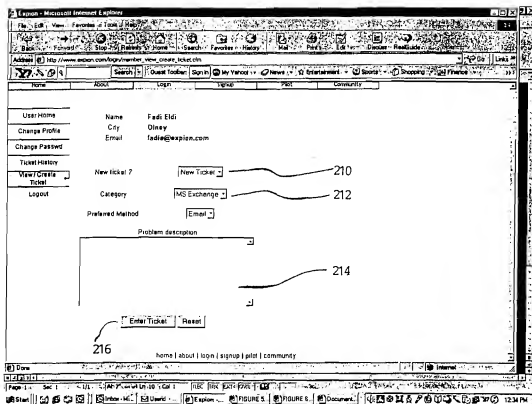


FIGURE 9

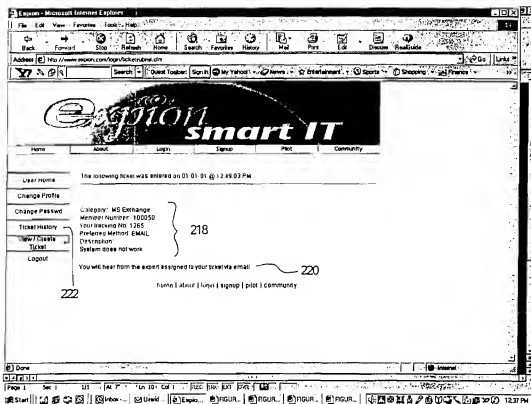


FIGURE 10

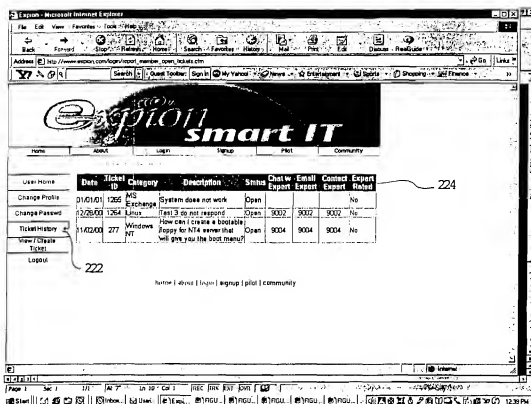


FIGURE 11

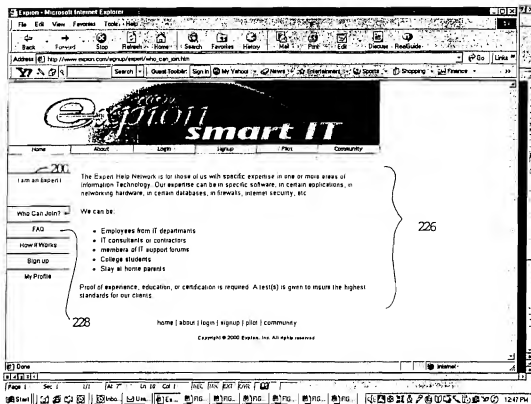


FIGURE 12

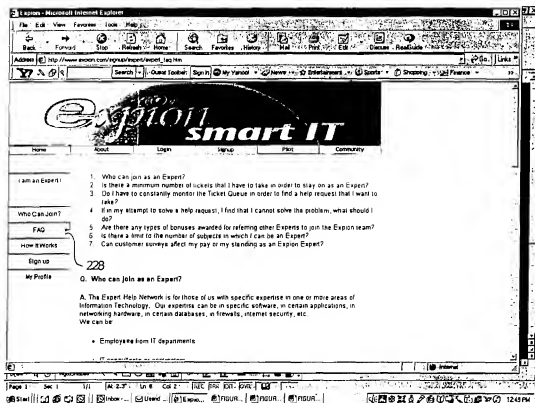


Figure 13



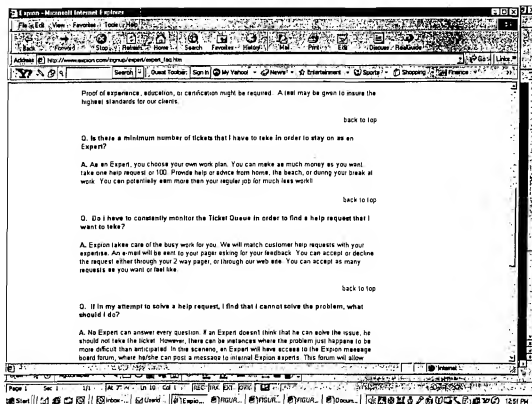


FIGURE 13A

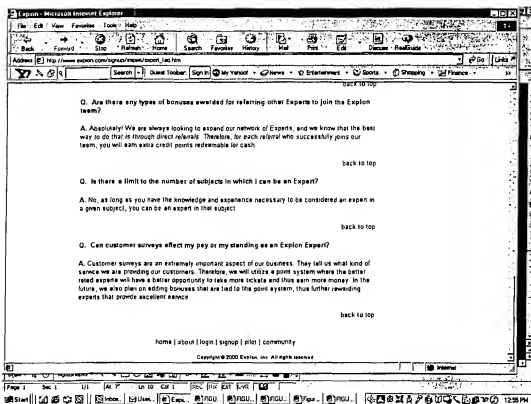


FIGURE 13B

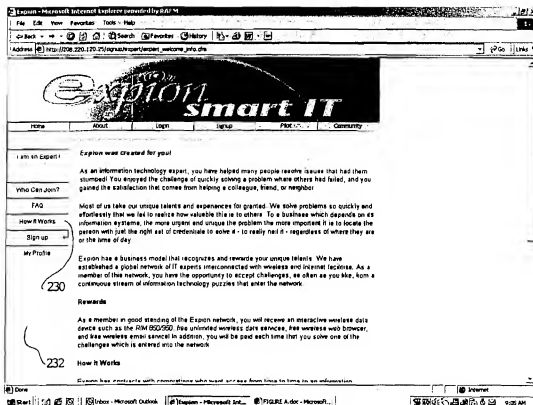


FIGURE 14

E-Helper.com - Microsoft Internet Explorer

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Address http://expion-srv1/signup/expert/expert\_signup.htm Go Links

# Expion smart IT

Home About Login Signup Free Trial Community

I am an Expert!

Who Can Join?

FAQ

How it Works

Sign up

### CONTACT INFO

First Name Fedi

Last Name Edit

Password

Confirm Password

By email Fadie@expion.com 234

By phone

By fax

By mail

City Bethesda

State/province MD

Postal code 20817

Country USA

236 Next Reset

Save and Exit

home | about | login | signup | free trial | community

Done Local intranet

FIGURE 15

E-Netnet.com - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Address http://espon-srv1/Signup/Expert/Expert\_registration.cfm

# Expert smart IT

Home About Login Signup Free Trial Community

I am an Expert |

Who Can Join?

FAQ

How It Works

Sign up

## SKILLS

Year	Type
2	Cisco
Year	Type
5	Exchange
Year	Type
6	Windows NT

238

236

Next Reset

Save and Exit

home | about | login | signup | free trial | community

Done Local intranet

FIGURE 16

Hotmail.com - Microsoft Internet Explorer

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Address http://expion-trvl/signup/expert/expert\_registration.cfm

**expion smart IT**

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Sign up

**EXPERIENCE**

Client/employer: TMS

Duration From: 01 / 1996 To: 03 / 2000

Your role/title: is Manager

Description: Manage Support Group

240

URL

236

Next Reset Save & Exit

Another Experience

home | about | login | signup | free trial | community

Local intranet

FIGURE 17

E-Helper.com - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Back Forward Stop Search Favorites History Home

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# expion smart IT

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I am an Expert

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FAQ

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Sign up

REFERENCE

First name: Stewart

Last name: Smith

Title:

Company:

Email:

Phone:

Description:

242

Next Reset Save and Exit

Another Ref

home | about | login | signup | free trial | community

Local intranet

FIGURE 18

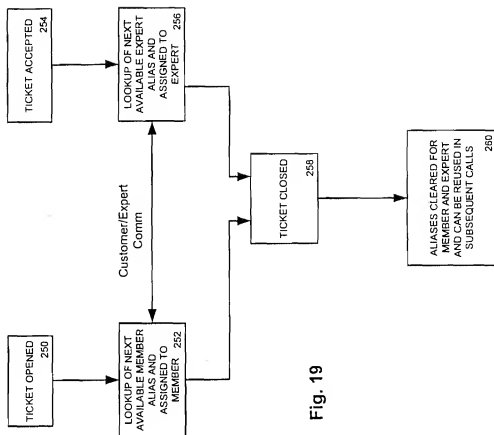


Fig. 19



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International Bureau(43) International Publication Date  
31 May 2001 (31.05.2001)

PCT

(10) International Publication Number  
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(74) Agents: ROBERTS, Jon, L. et al.; Roberts Abokhair and Mardula, LLC, Suite 1000, 11800 Sunrise Valley Drive, Reston, VA 20191 (US).

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For two-letter codes and other abbreviations, refer to the "Guidance Notes on Codes and Abbreviations" appearing at the beginning of each regular issue of the PCT Gazette.



WO 01/39076 A2

(54) Title: SYSTEM AND METHOD FOR PROVIDING INFORMATION TECHNOLOGY IT EXPERT REFERRAL OVER A NETWORK

(57) Abstract:

## PATENT COOPERATION TREATY

## PCT


## DECLARATION OF NON-ESTABLISHMENT OF INTERNATIONAL SEARCH REPORT

(PCT Article 17(2)(a), Rules 13ter.1(c) and Rule 39)

Applicant's or agent's file reference <b>2590-002PCT</b>	IMPORTANT DECLARATION	Date of mailing(day/month/year) <b>21/09/2001</b>
International application No. <b>PCT/US 00/ 32028</b>	International filing date(day/month/year) <b>22/11/2000</b>	(Earliest) Priority date(day/month/year) <b>23/11/1999</b>
International Patent Classification (IPC) or both national classification and IPC		<b>G06F17/60</b>
Applicant <b>STEPHANOU, Dimitri</b>		

This International Searching Authority hereby declares, according to Article 17(2)(a), that **no international search report will be established** on the international application for the reasons indicated below

1. ☒ The subject matter of the international application relates to:
- a. ☐ scientific theories.
  - b. ☐ mathematical theories
  - c. ☐ plant varieties.
  - d. ☐ animal varieties.
  - e. ☐ essentially biological processes for the production of plants and animals, other than microbiological processes and the products of such processes
  - f. ☒ schemes, rules or methods of doing business.
  - g. ☐ schemes, rules or methods of performing purely mental acts.
  - h. ☐ schemes, rules or methods of playing games.
  - i. ☐ methods for treatment of the human body by surgery or therapy.
  - j. ☐ methods for treatment of the animal body by surgery or therapy.
  - k. ☐ diagnostic methods practised on the human or animal body.
  - l. ☐ mere presentations of information.
  - m. ☐ computer programs for which this International Searching Authority is not equipped to search prior art.
2. ☐ The failure of the following parts of the international application to comply with prescribed requirements prevents a meaningful search from being carried out:
- ☐ the description
  - ☐ the claims
  - ☐ the drawings
3. ☐ The failure of the nucleotide and/or amino acid sequence listing to comply with the standard provided for in Annex C of the Administrative Instructions prevents a meaningful search from being carried out:
- ☐ the written form has not been furnished or does not comply with the standard.
  - ☐ the computer readable form has not been furnished or does not comply with the standard.
4. Further comments:

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 NL-2280 HV Rijswijk  
 Tel. (+31-70) 340-2040, Tx: 31 651 epo nl,  
 Fax: (+31-70) 340-3016

Authorized officer

María Rodríguez Nóvoa

## FURTHER INFORMATION CONTINUED FROM PCT/ISA/ 203

The subject-matter claimed in claims 12-22 falls under the provisions of Article 17(2)(a)(i) and Rule 39.1(iii) PCT, such subject-matter relating to a method of doing business.

Claims 1-11 relate to commonplace technological features for performing the business method of the method claims. Although these claims do not literally belong to the method category, they essentially claim protection for the same commercial effect as the method claims. With reference to the Guidelines, B-VIII, points 1-6, the International Searching Authority considers that searching such commercial features would serve no useful purpose. This applies to the remaining commonplace technological features of these claims as well.

The applicant's attention is drawn to the fact that claims relating to inventions in respect of which no international search report has been established need not be the subject of an international preliminary examination (Rule 66.1(e) PCT). The applicant is advised that the EPO policy when acting as an International Preliminary Examining Authority is normally not to carry out a preliminary examination on matter which has not been searched. This is the case irrespective of whether or not the claims are amended following receipt of the search report or during any Chapter II procedure. If the application proceeds into the regional phase before the EPO, the applicant is reminded that a search may be carried out during examination before the EPO (see EPO Guideline C-VI, 8.5), should the problems which led to the Article 17(2) declaration be overcome.